

CHECKLIST FOR IMPORTANT DOCUMENTS AND INFORMATION

Fill in this checklist as soon as you can. Make sure you keep it in a secure place, for example, with your solicitor, and remember to keep it up to date.

Assets

- ☐ Current account details (bank name, address, account number)
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- ☐ Savings and investments (account numbers and share certificates)
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- ☐ Online bank and savings accounts, including usernames and passwords
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- ☐ Car(s)
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- ☐ Contents of house, eg, furniture and personal effects
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- ☐ House (or other owned property)
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- ☐ National savings and premium bonds
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☐ Pensions: state and private

☐ Insurances

☐ Business

Debts/liabilities

☐ Credit card providers' details and account numbers

☐ Direct debits, standing orders and other monthly payments

☐ Hire purchase/loan agreement details

☐ Mobile phone provider and account details

☐ Mortgage provider's details and account number

☐ Rental agreements and statements

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☐ Utility providers (gas, electricity, water) and council tax

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Other information

☐ Tax office details and National Insurance number

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☐ NHS or Health Service number

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☐ Safety deposit box

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☐ Social media (Facebook, eBay, Twitter, weblogs) accounts and passwords

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☐ Employer and trade union details

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Where to find important documents

- ☐ House deeds
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- ☐ Birth and marriage certificates
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- ☐ Divorce decree
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- ☐ Will and Power of Attorney
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- ☐ Advance decision
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- ☐ Passport and driving licence
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- ☐ Vehicle registration document
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- ☐ Insurance policies
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- ☐ Bank statements
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- ☐ Share certificates
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- ☐ Address book listing friends and family
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- ☐ Travel cards and membership cards (eg, for library, sports club)
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- ☐ Parkinson's UK brain donor card / other donor cards
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- ☐ Keys for property and car(s)
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- ☐ General paperwork
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